

## Special Section for School and Child Care Users

This special section for school and child care users covers the registry software application functionality that is only available to these kinds of users. Most school and child care providers may view record which is known as “Read-only” access to SDIR. That is, users can search for records, view the records and print out certain forms and reports. However, some schools may be given access to SDIR to enter student health information once they obtain parent or the individual student (if adult or emancipated) written consent.

Sections 1 & 2 of the Read-only User Manual explain how to login and search for records in the registry, this section covers the following functionality:

- How to enter disease history,
- How to enter waivers/exemptions,
- How to print out the California School Immunization Record (CSIR) also known as the Blue Card,
- How to produce a School Roster Report,
- How to enter CHDP Annual School Exam date and result,
- How to enter the Oral Health Exam date and result.
- Then, after creating the School Roster, the guide explains how to print:
  - the Kindergarten Immunization Assessment Work Sheet and the Immunization Assessment of Kindergarten Students-Annual Report, School Summary Sheet (PM 236 5/07)
  - the Worksheet for the Annual Immunization Report on Children enrolled in Child Care Center and the Annual Immunization Report on Children enrolled in Child Care Centers (CDPH 8018 5/07)

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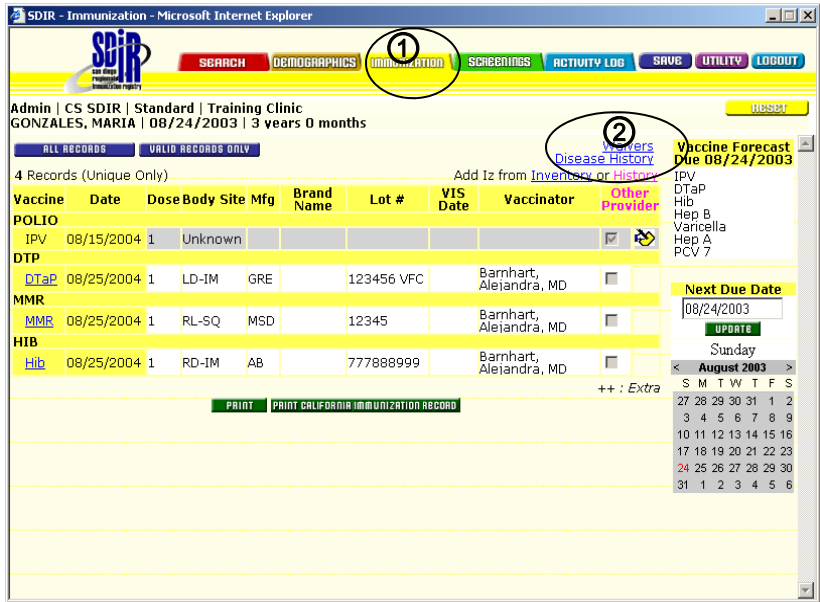
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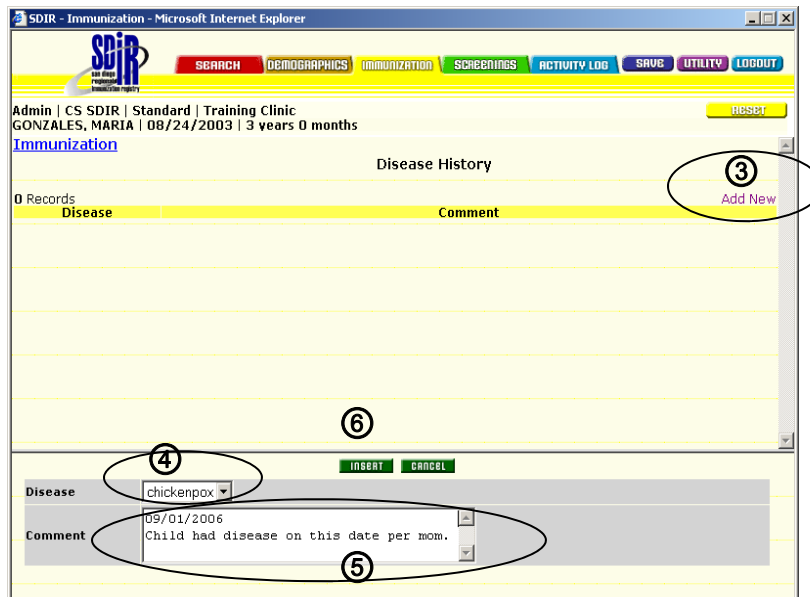
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## How to Add Disease History

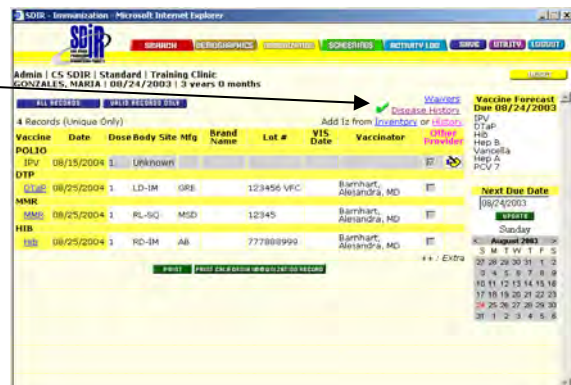
- ① Click on the IMMUNIZATION tab
- ② Click on “Disease History”



- ③ Click on “Add New”
- ④ Select “Disease”
- ⑤ Edit date and/or add Comment (Today’s date will automatically be entered in the Comment section. Click in the Comment section to edit the date. If you change the date, make certain you **don’t change its format**. If you need to make additional comments, begin typing *after* the date.)
- ⑥ Click on “Insert”



If disease history has been entered, you will see a check mark next to the word “Disease History”



## How to Document a Vaccine Waiver (Exemption)

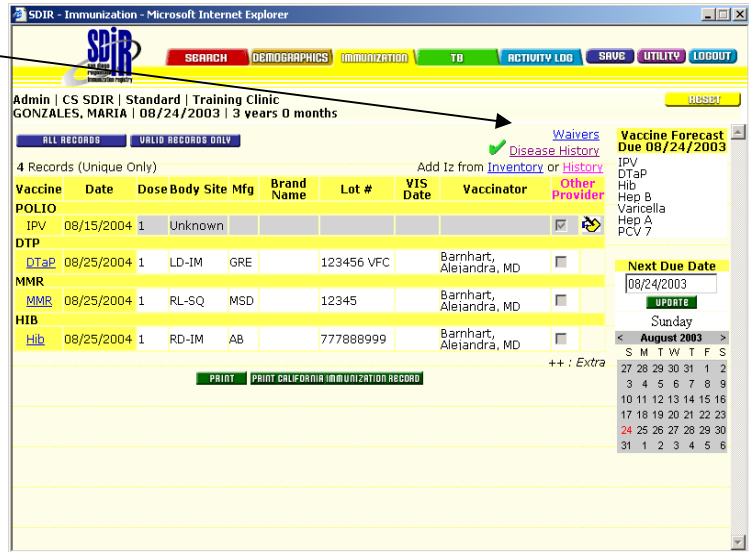
Vaccine waivers are allowed for medical, religious and philosophical reasons.

The waivers can be permanent or temporary.

There are two ways to select waivers: by vaccine **group** (e.g., MMR) or by a specific **vaccine** (Varicella).

If a specific vaccine is selected and it is part of a combination vaccine (e.g., measles), the remaining vaccines of the group can still be forecasted.

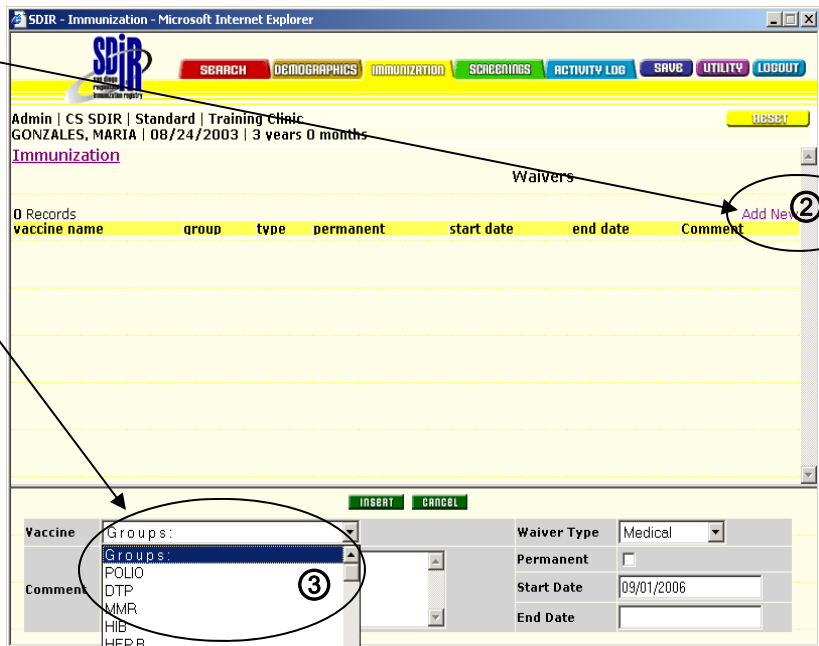
① Click on the “Waivers” link



② Click on “Add New” (this will only appear if you are working on a home record.)

③ Click on the drop-down box to select the list of VACCINES you want to waive.

**Note:** if a specific vaccine is selected and it is part of a combination vaccine (e.g. measles), the remaining vaccines of the group can still be forecasted.



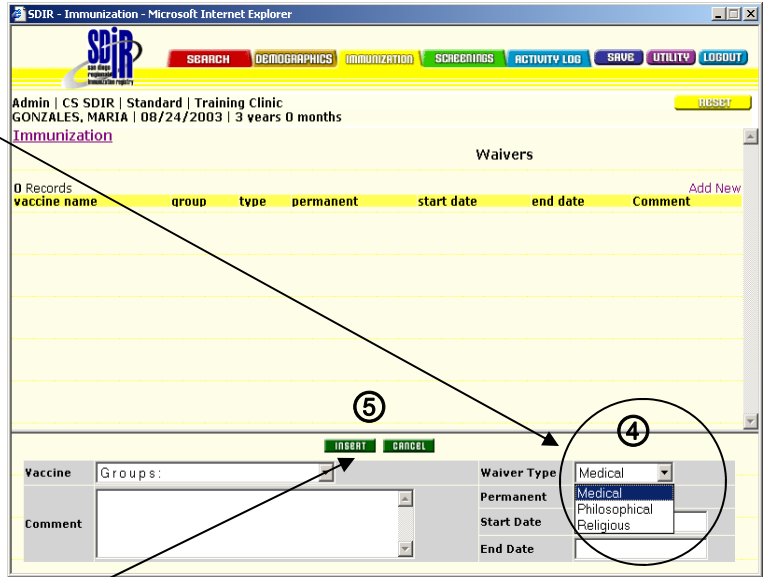
④ Select the type of waiver or exemption that is appropriate:

- Medical
- Philosophical\*
- Religious\*

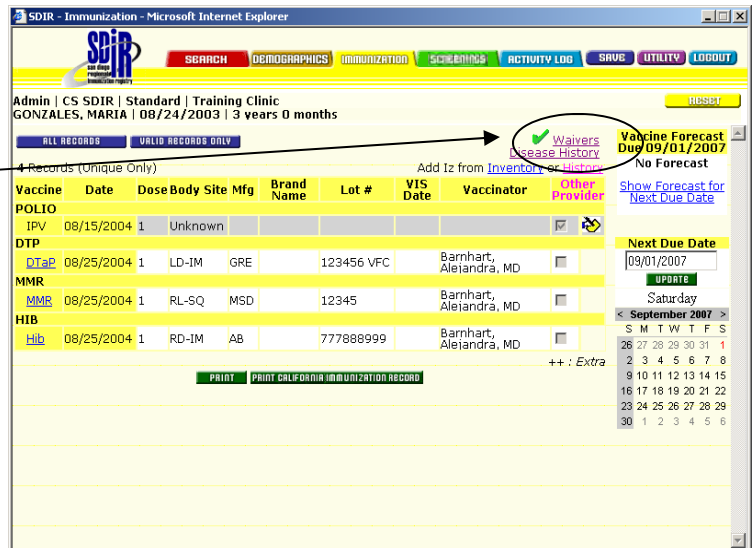
Check the box next to “Permanent” if the waiver is not temporary.

If the waiver is temporary, enter in a “Start Date” and an “End Date”. You may also enter any notes in the comment box.

\* “All immunizations” can be selected.



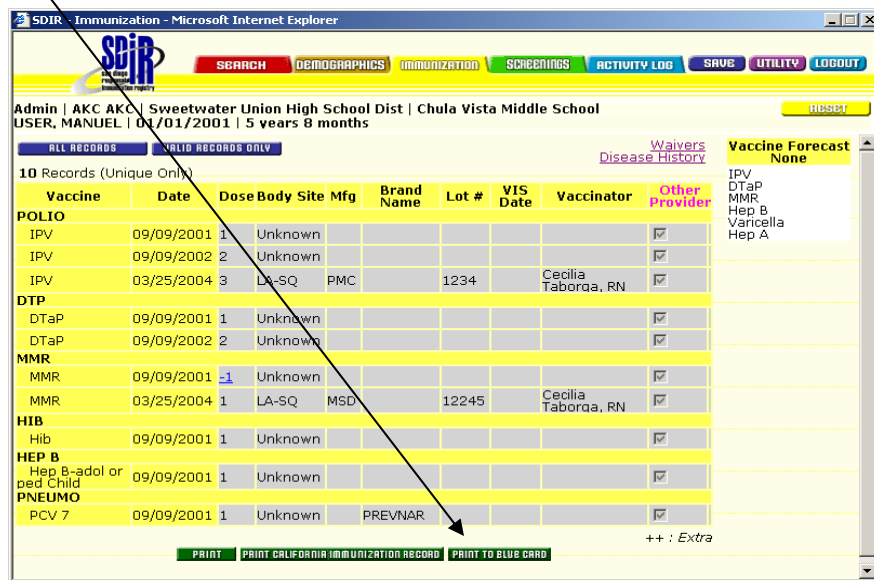
⑤ Click “Insert”. You will then return to the Immunization screen and see a green check mark next to the word “Waiver”.



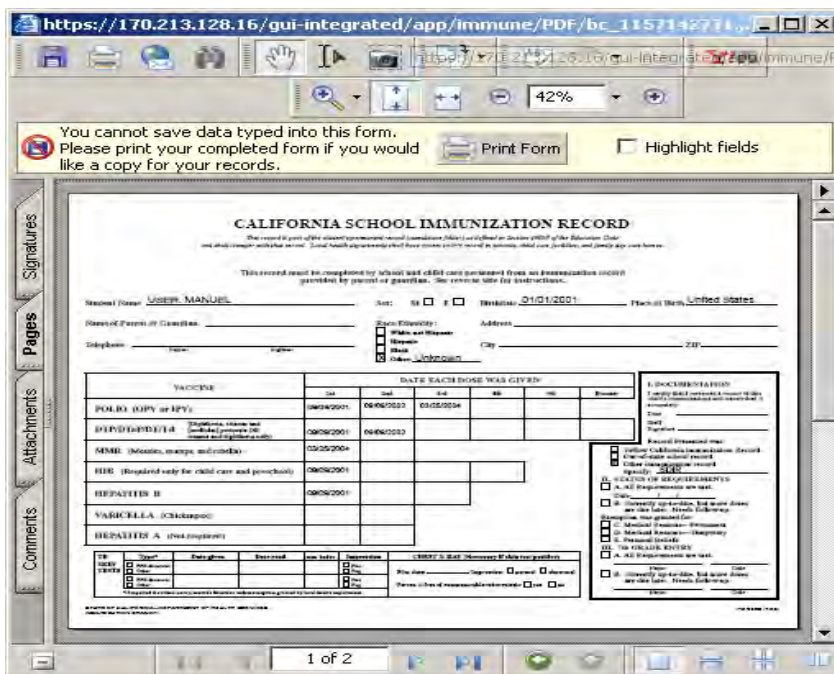
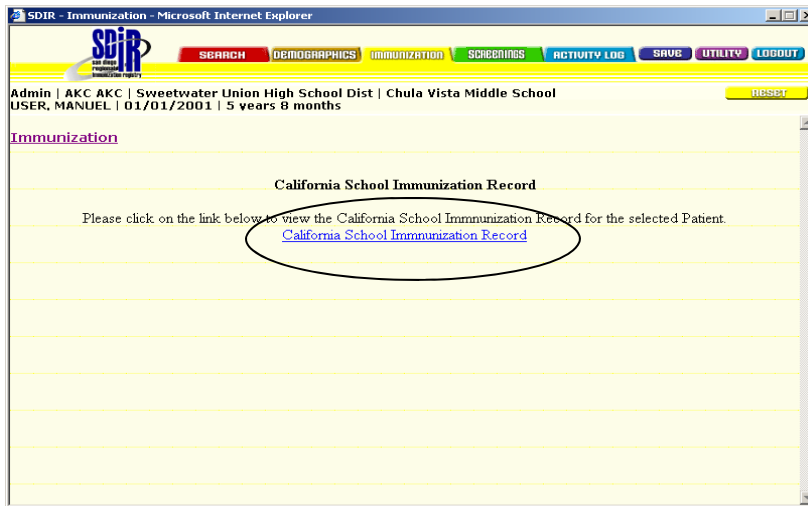
## How to View and Print the School Immunization Record (Blue Card)

### California School Immunization Record or Blue Card:

Now school users can print out a copy of the California School Immunization Record, commonly known as the “Blue Card”. School users should go to the bottom of the Immunization Screen and click on the “print to blue card” button.



This will open the following screen:



**Important:** The list of immunizations that the child had in the immunization screen will be transferred over to the blue card once the user click to “print to blue card” button. Only the total number of immunizations (which may be valid and invalid shots) that the CA school law\* requires will be printed out of the blue card, no matter how many list of individual immunizations that the child has on the CIR. For example: If the child had 6 IPV’s indicated in the immunization screen, only 4 IPV’s will be transferred over to the blue card.

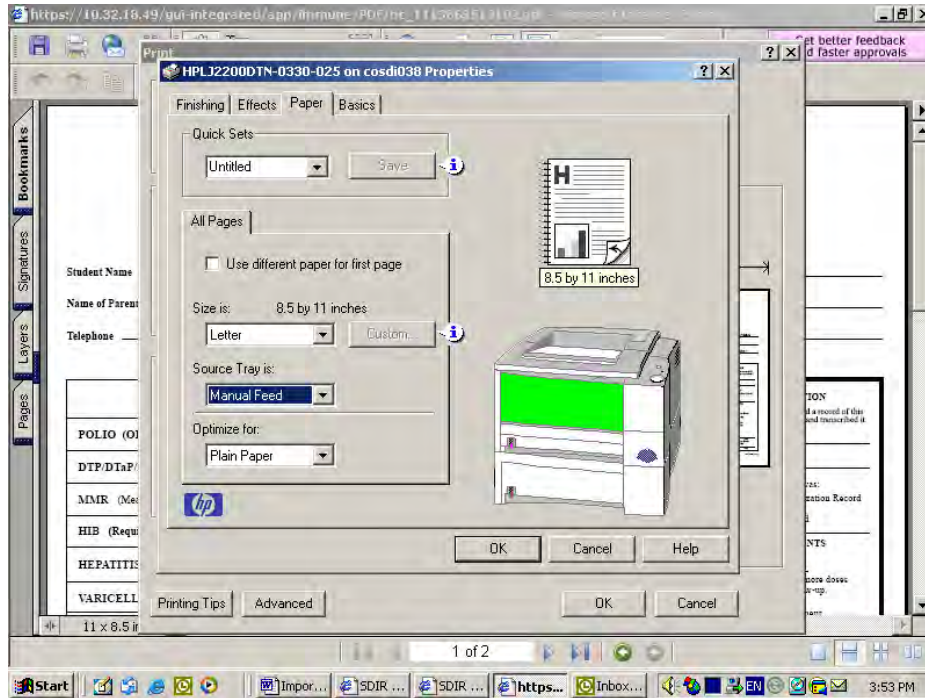
\*California Immunization Handbook for Schools and Child Care Providers: <http://www.dhs.ca.gov/ps/dcdc/izgroup/pdf/HandbookText.pdf>

## Blue Card Printing Guidelines & Tips:

- ✓ The blue card should be printed on a light blue paper.
- ✓ The blue card can be a two pages or double-sided document.

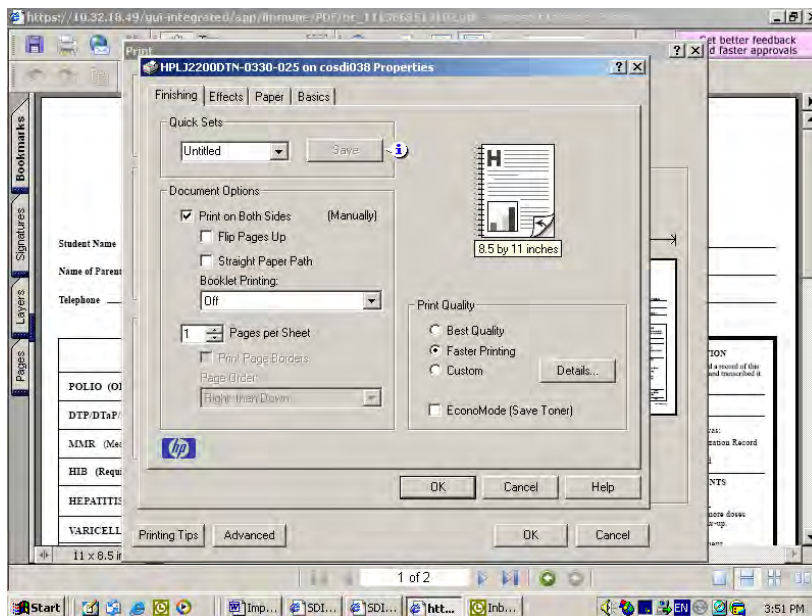
### Printer set-up:

To make a two page blue card: Place the blue paper in the manual tray. Select “Manual Feed” for the source tray.

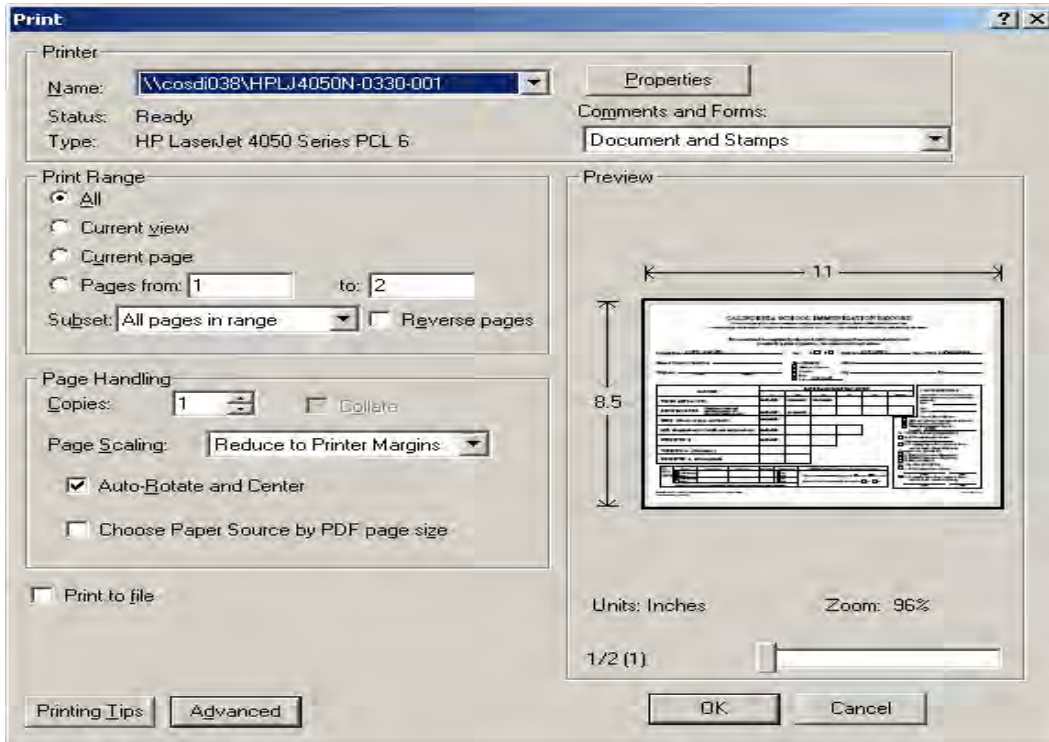


To make a double-sided blue card— There are two options:

- a) If your printer can do double sided pages. Set the printer properties for document options to “print on both sides”



- c) Double-sided but printed one page at a time. To print out one page at a time: click on printer and select current page. Print it and then turn it over and reinsert in the printer. Print the other page.



## How to use the School Roster Report

The purpose of the school roster is that it will group together in a report format, children's records in the registry and then display their immunizations that are in the SDIR. New entries (patient records and their immunizations) to the registry can be entered manually by the school user.

The childcare/school roster report has dual functionality: that is, the data can be entered by the user by either searching for and selecting or entering a new student in the roster. The 2<sup>nd</sup> way that the roster report can be used is through childcare/school users using an import batch file function that will accept common text, tab, or comma delimited files which the registry will review and then identify an existing patient immunization records group them into the roster. Rosters can be named by indicating the school, grade, and teacher.

There are two ways to use the school roster report, the instructions are therefore separated into two sections 1) Searching and entering names and immunizations, 2) Uploading a batch file of names and have the registry automatically compile the roster report

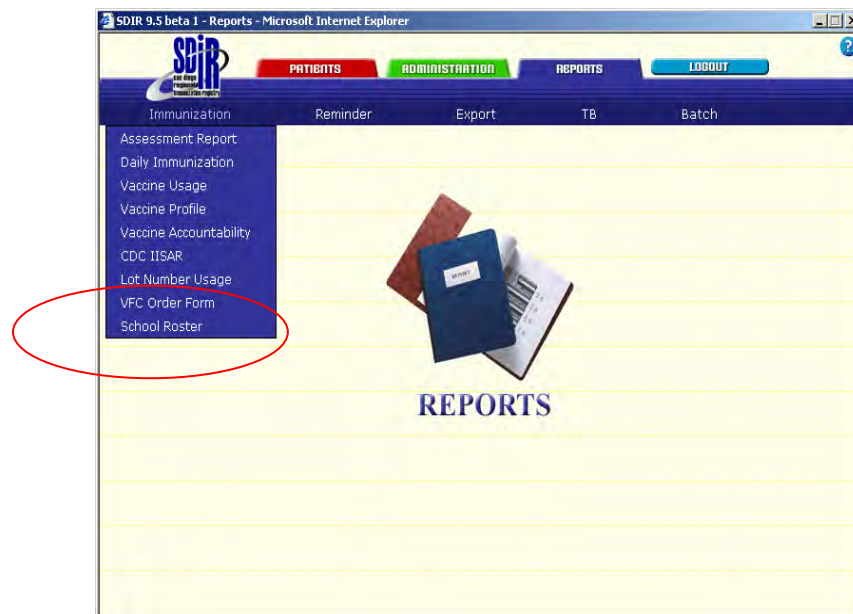
A question and answer section addressing the functionality of the school roster follows the detailed instructions.

### Steps to create and use the school roster report:

Start here for either of the methods

1. Go to the Utility Tab, click on Reports and then click on Immunization.

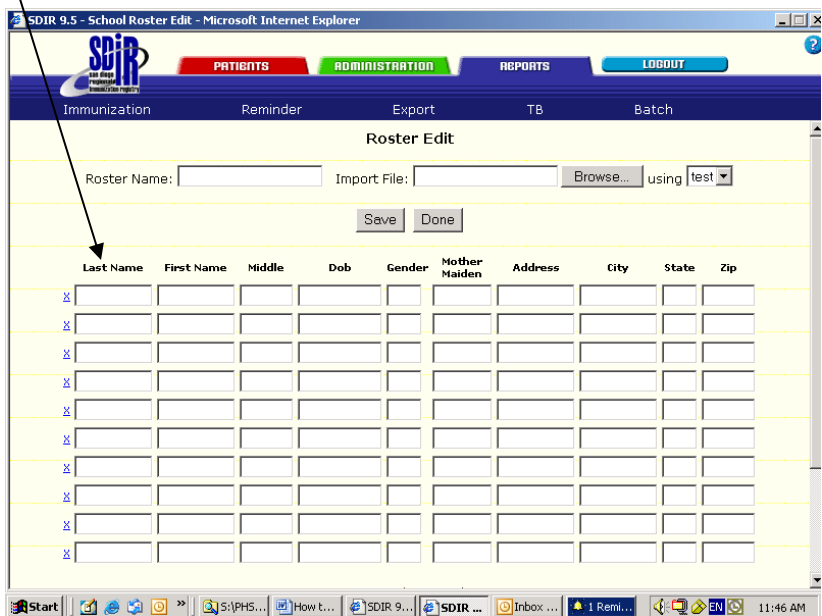
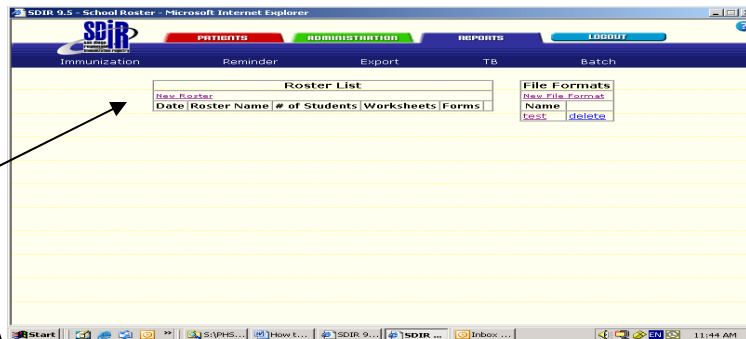
2. Find and click on School Roster.



**Method 1: Search and enter individual names and immunization information:**

1. Click on the New Roster under the Roster List.
2. Start entering names and information in each row .

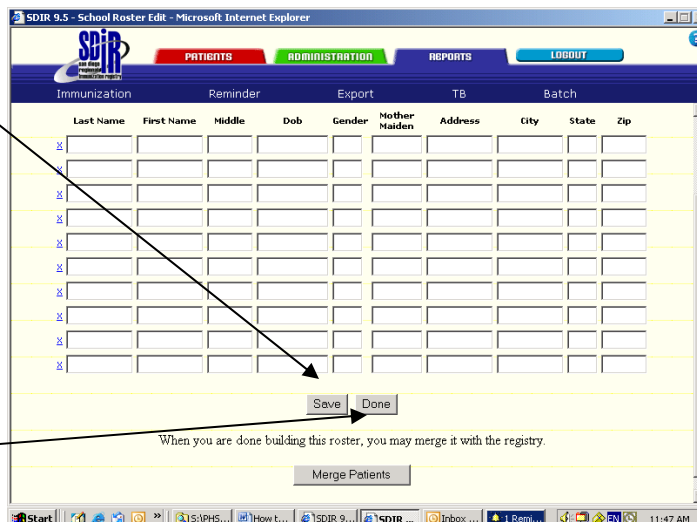
Note: you can avoid having to enter names individually if you have a **.tab delimited file\*** already created. Simply enter a roster name and upload the file using the browse button. This is Method 2 and is explained starting on the next page (4.11).



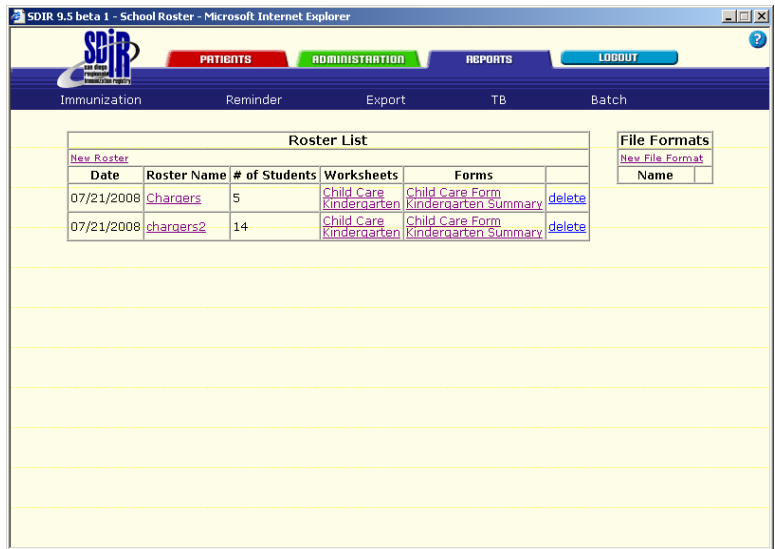
1. When finished entering new names, click on Save.
2. Then to create the Roster Report, click on Merge Patients.

The application will check the registry for the records of immunizations for those students.

If you do not want to run the Roster Report, then click on the 'Done' button.



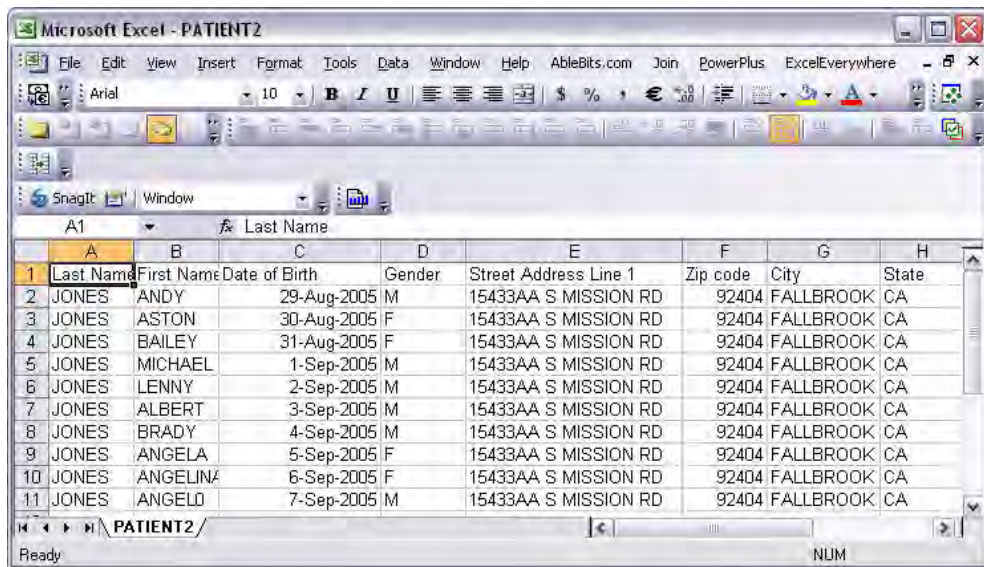
6. You can go back to this roster report to enter or edit names by clicking on the appropriate roster name.



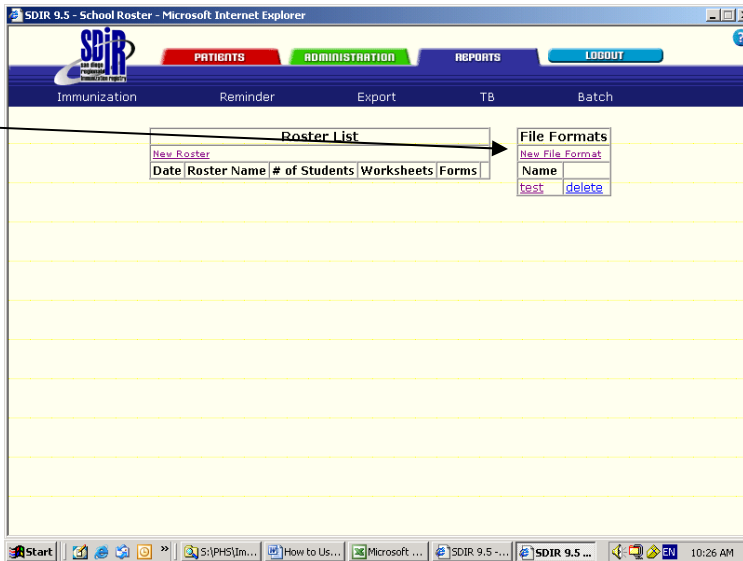
### Method 2. Upload an Excel file with student names and other information

If you have an Excel or other “flat” file (a file made up of multiple records each one with on its own line or row) list of names and demographic information, you need to follow these steps:

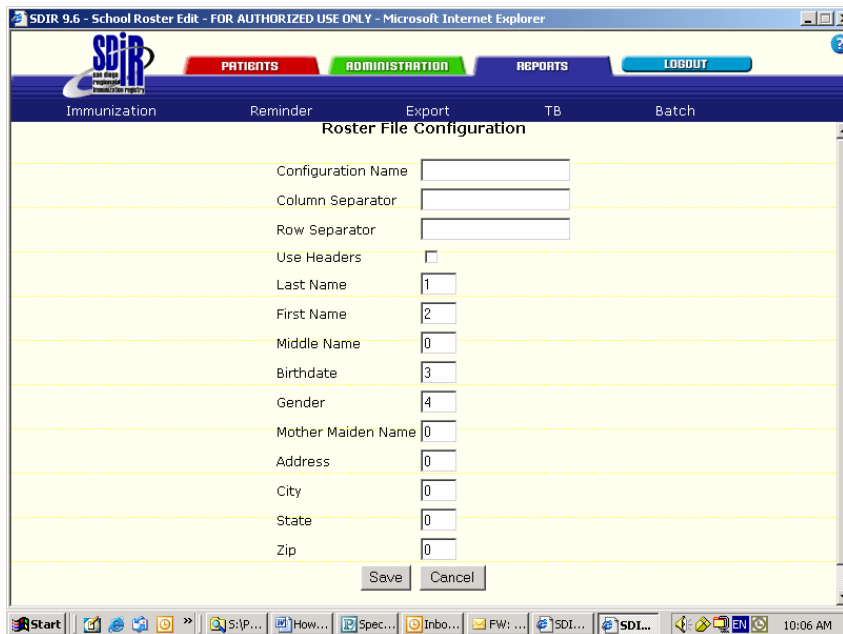
1. Below is an example of a tab delimited file using Excel which organizes the information in a column and row format. Note that there are header names at the top of each column. **Save the Excel file as .tab (tab delimited) file on your computer with a file name and in a folder that you will be able to locate later.**



Click on the New File Format link in the File Format section to the right of your screen.



The Roster File Configuration screen will appear. This screen is used to create a template that can be used for the tab delimited file that contains the list of student names. The next step is to fill in the blanks to create the new configuration file that matches the tab delimited file.



Give the file format a configuration name. The example is SD High School for the configuration name.

Leave the column separator and row separator blank for now.

If there are headers (column names) in your Excel file, click the “Use Headers” box.

Look at your tab delimited file and match the columns in your tab delimited file with the column names on the roster screen. For example, Column 1 in the sample tab delimited file is Last Name so in the roster screen for Last Name enter the number 1 and so on until all of the entries in the roster screen have been filled by the appropriate number on the file columns that will be uploaded. Note: the tab delimited file may contain additional fields that do not need to be uploaded. Only number the fields that will be uploaded. Click on the *Save* button to save the new configuration file.

The screenshot shows the SDIR web application interface. At the top, there is a navigation bar with tabs for PATIENTS, ADMINISTRATION, REPORTS, and LOGOUT. Below this, there are sub-tabs for Immunization, Reminder, Export, TB, and Batch. The main content area is divided into two sections: 'Roster List' and 'File Formats'.

**Roster List**

Date	Roster Name	# of Students	Worksheets	Forms	
07/21/2008	<a href="#">Chargers</a>	5	<a href="#">Child Care Kindergarten</a>	<a href="#">Child Care Form Kindergarten Summary</a>	<a href="#">delete</a>
07/21/2008	<a href="#">MannyTEST</a>	1	<a href="#">Child Care Kindergarten</a>	<a href="#">Child Care Form Kindergarten Summary</a>	<a href="#">delete</a>
07/21/2008	<a href="#">chargers2</a>	15	<a href="#">Child Care Kindergarten</a>	<a href="#">Child Care Form Kindergarten Summary</a>	<a href="#">delete</a>
07/22/2008	<a href="#">Nancyschool</a>	9	<a href="#">Child Care Kindergarten</a>	<a href="#">Child Care Form Kindergarten Summary</a>	<a href="#">delete</a>
07/22/2008	<a href="#">Lakers</a>	17	<a href="#">Child Care Kindergarten</a>	<a href="#">Child Care Form Kindergarten Summary</a>	<a href="#">delete</a>

**File Formats**

Name	
<a href="#">SD High school</a>	<a href="#">delete</a>

Links: [New Roster](#), [New File Format](#)

The new SD High School configuration file format will be found in the file formats table (left of the screen). This file format will be used later in uploading/creating a new roster.

Select *New Roster* (See the words on the upper left under Roster List) and the screen below will appear.

The screenshot shows the 'Roster Edit' form in the SDIR web application. The form includes fields for Roster Name, Import File, and a dropdown menu for File Format (set to 'SD High school'). There are 'Save' and 'Done' buttons. Below the form is a table for entering student information.

**Roster Edit**

Roster Name:  Import File:   using

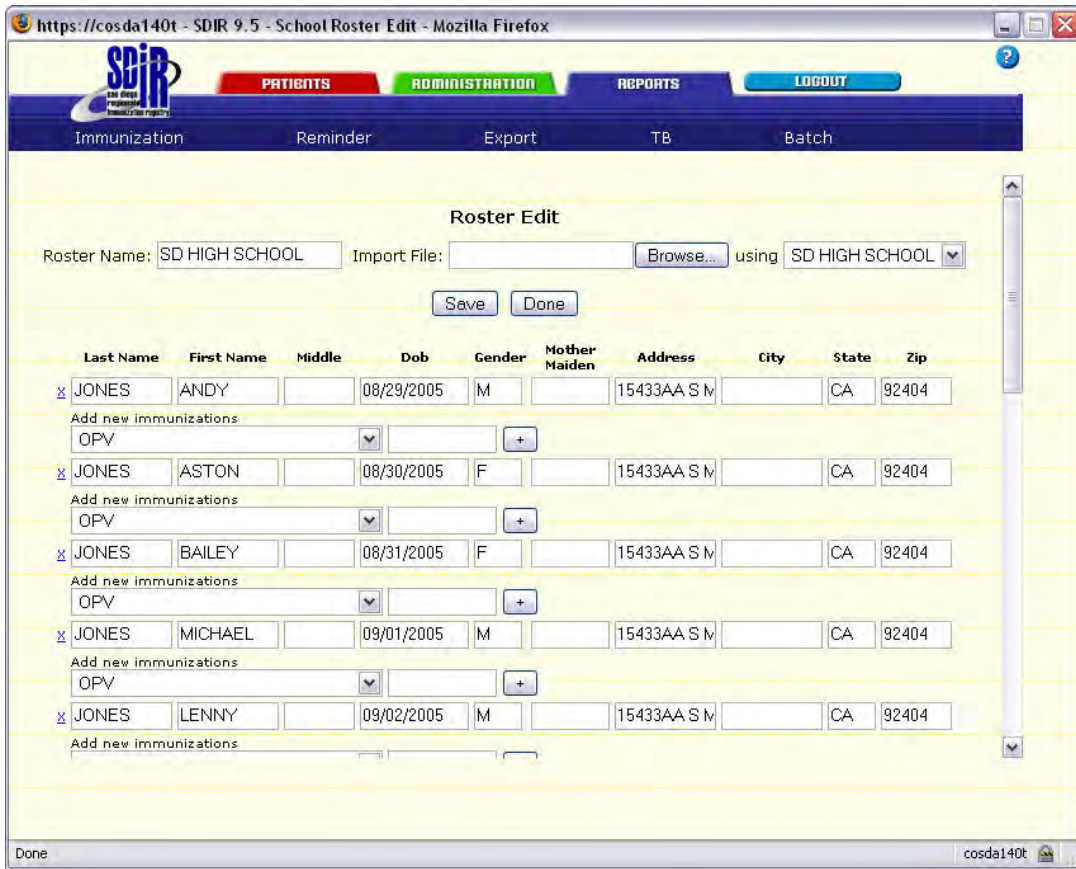
	Last Name	First Name	Middle	Dob	Gender	Mother Maiden	Address	City	State	Zip
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

On the Roster Edit screen, the drop-down list on the top right field contains the new configuration file that was created and will be used for this upload. (If you do not see the new configuration file wanted, click on the drop-down menu's button and select it from the list). Fill in the Roster name with what the name of the school or class that is appropriate.

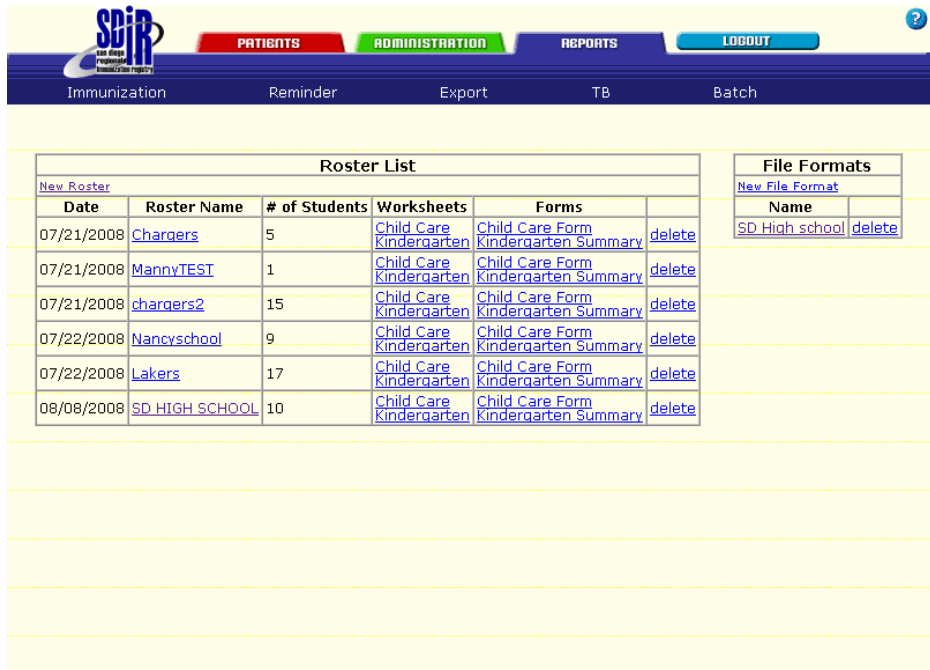
At this point, close the tab delimited file. **If the file is still open on your computer even if it's minimized, the file cannot be uploaded..** Now click on *Browse* and select the file.

Now the Roster Edit screen will look like this. You have chosen a name for the roster, navigated to the delimited file with all the student information that you wish to upload (If you have an Excel file that contains your student data, you can select Save AS from the file menu and save as a tab delimited file.) and selected the configuration that was created earlier.

Now press the save button at the top of the screen.



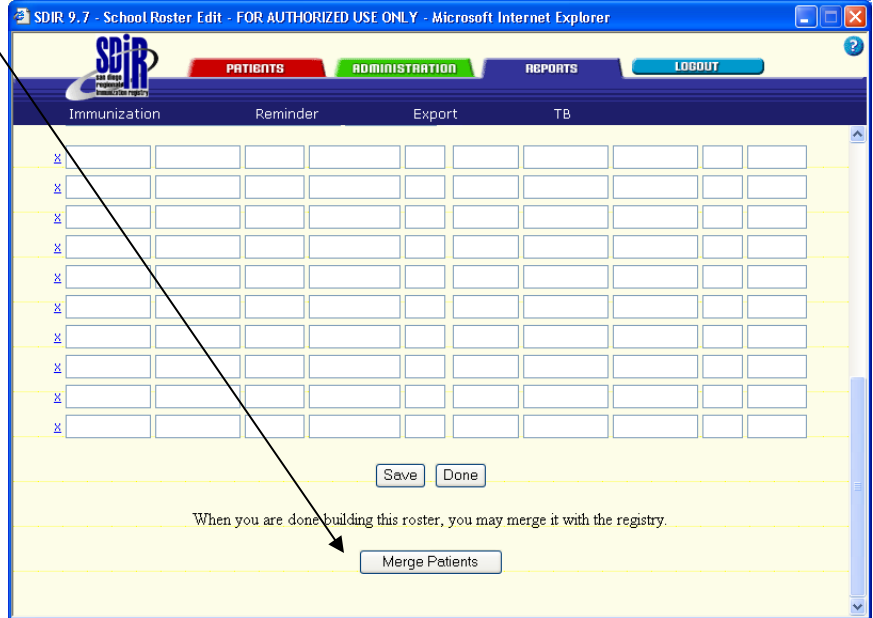
Your data from the tab delimited file have now populated the Roster Edit screen. You may now review the data and press save to save the roster at the bottom of the screen or you may press “Done” to cancel the save. If you save the new roster will be added to the roster list and is available for selection.



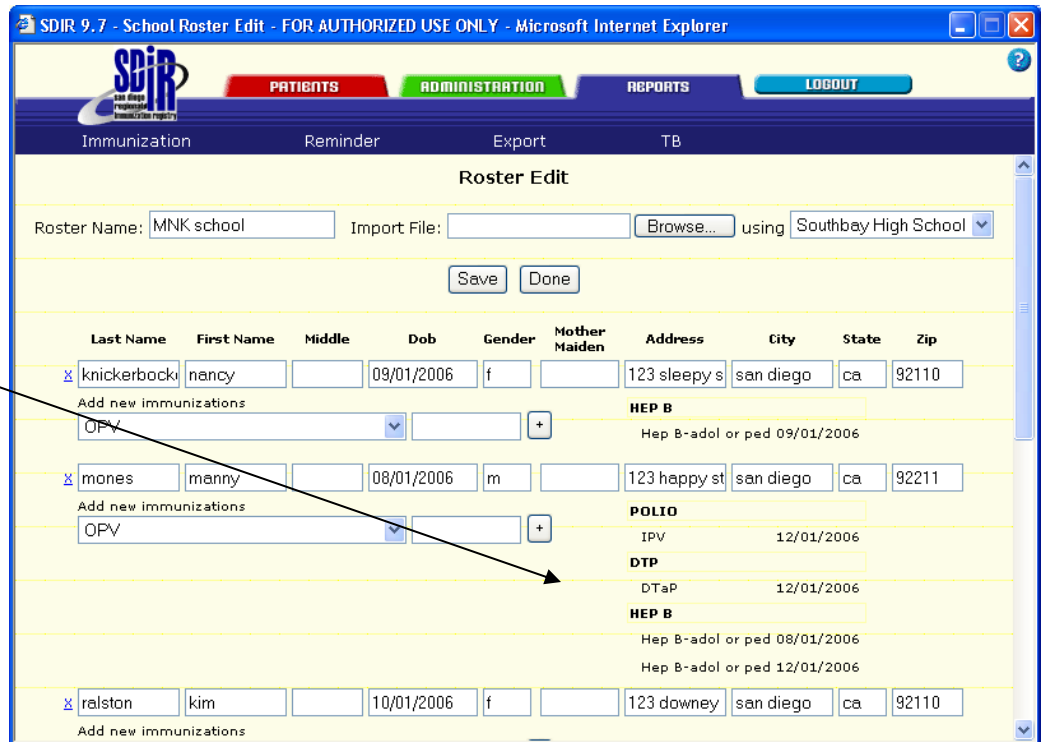
Once the roster is complete, go to the bottom and click on “Merge Patients”.

This will make any shots in the registry that match the student information appear below or next to the student’s name.

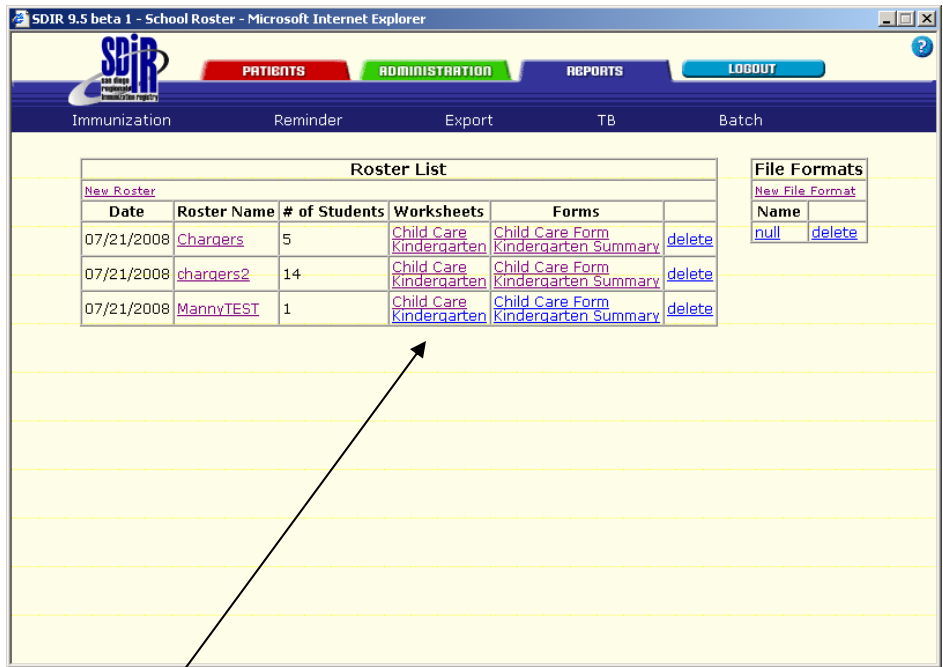
Note: If any ‘new’ student records have never been entered in the registry, those records will be locked (closed to sharing) until a the student visits a provider that is using the registry and is informed that their record is in the registry. For students that already have a record in the registry, the sharing status of their record will not change.



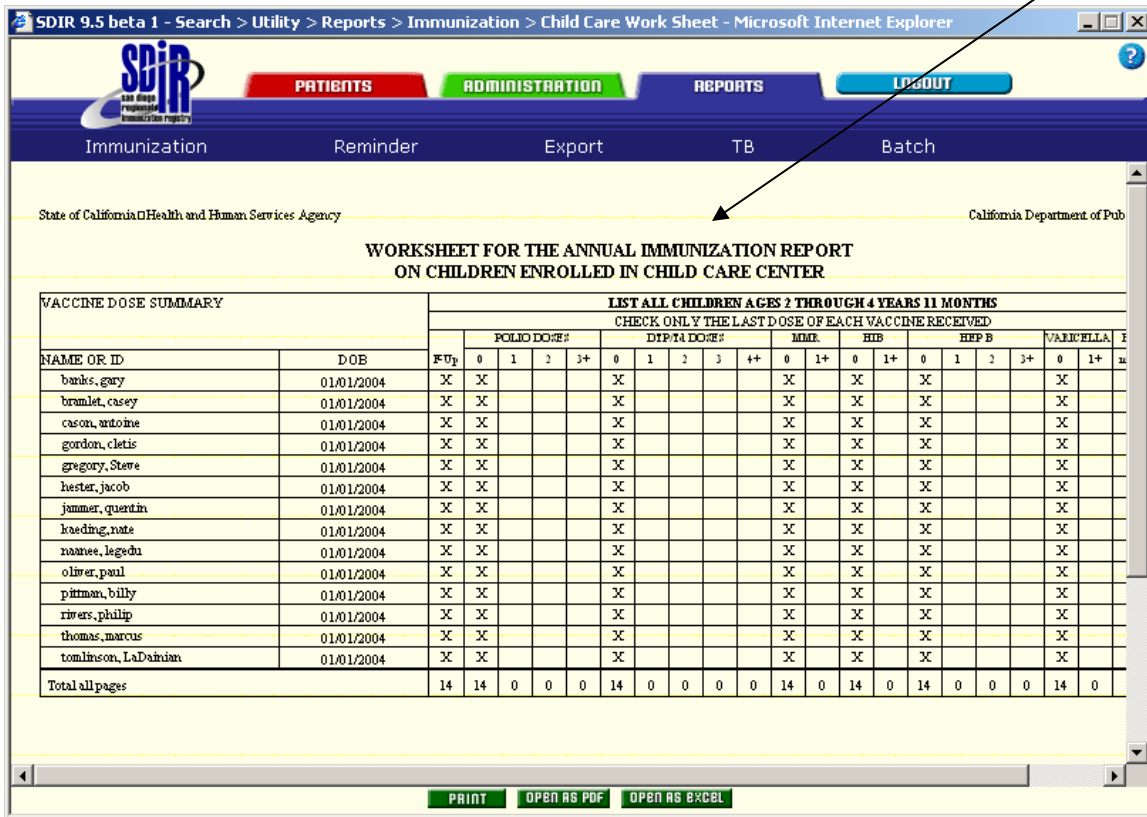
Whether the student roster has been uploaded or entered manually, merged shots will appear associated with the student. Immunizations that are not in the registry can be added manually.



State worksheets and forms can be generated out of the Roster List.



When you click on the Child Care link in the "worksheets" column, it will generate this form.



You have the option to open in PDF or EXCEL and then be able to save the form.

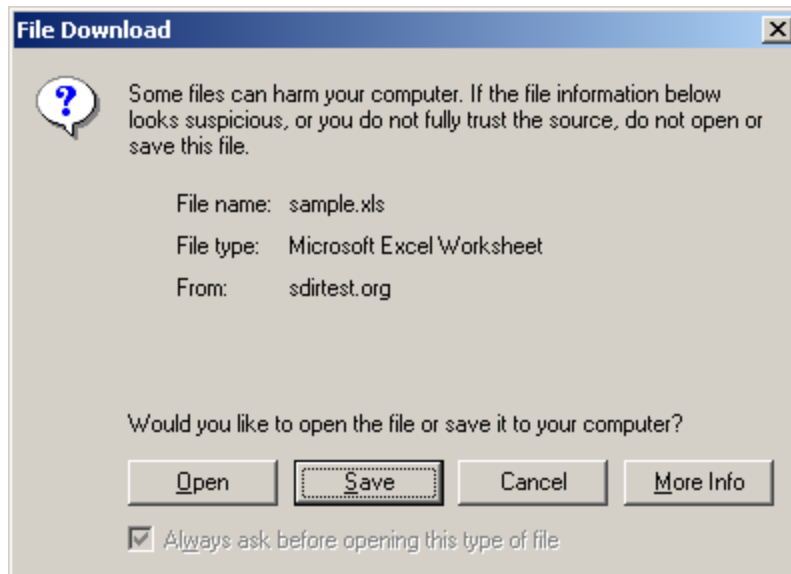
State of California—Health and Human Services Agency  
California Department of Public Health

WORKSHEET FOR THE ANNUAL IMMUNIZATION REPORT  
ON CHILDREN ENROLLED IN CHILD CARE CENTER

VACCINE DOSE SUMMARY		LIST ALL CHILDREN AGES 2 THROUGH 4 YEARS 11 MONTHS CHECK ONLY THE LAST DOSE OF EACH VACCINE RECEIVED																					
NAME OR ID	DOB	POLIO DOSES				DTP/Td DOSES				MMR		HIB		HEP B			VARICELLA		EXEMPT				
		F-Up	0	1	2	3+	0	1	2	3	4+	0	1+	0	1+	0	1	2	3+	0	1+	med	pers
banks, gary	01/01/2004	X	X				X					X		X		X				X			
bramiet, casey	01/01/2004	X	X				X					X		X		X				X			
oason, antoine	01/01/2004	X	X				X					X		X		X				X			
gordon, cletis	01/01/2004	X	X				X					X		X		X				X			
gregory, Steve	01/01/2004	X	X				X					X		X		X				X			
hester, jacob	01/01/2004	X	X				X					X		X		X				X			
jammer, quentin	01/01/2004	X	X				X					X		X		X				X			
kaeding, nate	01/01/2004	X	X				X					X		X		X				X			
naanee, legedu	01/01/2004	X	X				X					X		X		X				X			
oliver, paul	01/01/2004	X	X				X					X		X		X				X			
pittman, billy	01/01/2004	X	X				X					X		X		X				X			
rivers, philip	01/01/2004	X	X				X					X		X		X				X			
thomas, marcus	01/01/2004	X	X				X					X		X		X				X			
tomlinson, LaDainian	01/01/2004	X	X				X					X		X		X				X			
Total all pages		14	14	0	0	0	14	0	0	0	0	14	0	14	0	14	0	0	0	14	0	0	0

PDF Format.

If you chose to “OPEN AS EXCEL” it will give you this option. You can Open, Save, Cancel or More info.



State of California—Health and Human Services  
California Department of Public Health

**WORKSHEET FOR THE ANNUAL IMMUNIZATION REPORT  
ON CHILDREN ENROLLED IN CHILD CARE CENTER**

VACCINE DOSE SUMMARY

LIST ALL CHILDREN AGES 2 THROUGH 4 YEARS 11 MONTHS  
CHECK ONLY THE LAST DOSE OF EACH VACCINE RECEIVED

NAME OR ID	DOB	F-Up	POLIO DOSES				DTP/tD DOSES				MMR	HIB	HEP B			A		EXEMPT				
			0	1	2	3+	0	1	2	3			4+	0	1+	0	1	2	3+	0	1+	med
banks, gary	01/01/2004	X	X				X				X	X	X					X				
bramlet, casey	01/01/2004	X	X				X				X	X	X					X				
cason, antoine	01/01/2004	X	X				X				X	X	X					X				
gordon, cletis	01/01/2004	X	X				X				X	X	X					X				
gregory, Steve	01/01/2004	X	X				X				X	X	X					X				
hester, jacob	01/01/2004	X	X				X				X	X	X					X				
jammer, quentin	01/01/2004	X	X				X				X	X	X					X				
kaeding, nate	01/01/2004	X	X				X				X	X	X					X				
naanee, legedu	01/01/2004	X	X				X				X	X	X					X				
oliver, paul	01/01/2004	X	X				X				X	X	X					X				
pittman, billy	01/01/2004	X	X				X				X	X	X					X				
rivers, philip	01/01/2004	X	X				X				X	X	X					X				
thomas, marcus	01/01/2004	X	X				X				X	X	X					X				
tomlinson, LaDairian	01/01/2004	X	X				X				X	X	X					X				
Total all pages		14	14	0	0	0	14	0	0	0	0	14	0	14	0	14	0	0	0	14	0	0

View of “EXCEL” Format

When you click on the Kindergarten link in the “worksheets” column, it will generate this form.

SDIR 9.5 beta 1 - Search > Utility > Reports > Immunization > Kindergarten Assessment Work Shee - Microsoft Internet Explorer

PATIENTS ADMINISTRATION REPORTS LOGOUT

Immunization Reminder Export TB Batch

State of California Health and Human Services Agency  
California Department of Public Health

**KINDERGARTEN IMMUNIZATION ASSESSMENT WORK SHEET**  
(Do Not Send In)

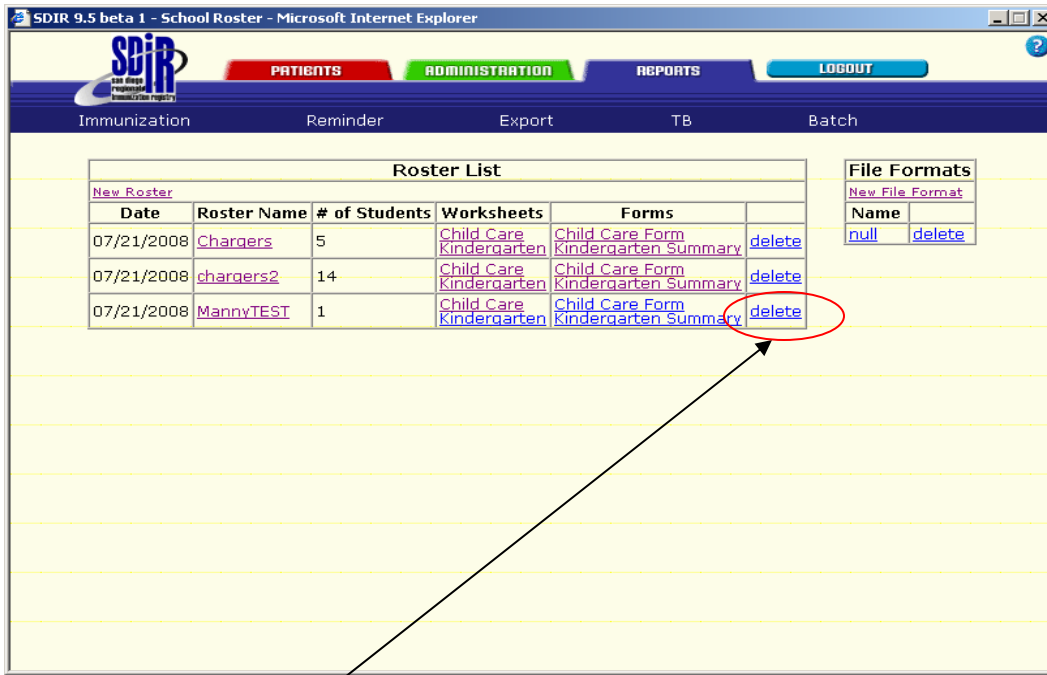
Each child should have either a check mark under UNCONDITIONAL ENTRANTS or check marks under CONDITIONAL ENTRANTS - never under both headings. (Use the Guide for Immunizations Required for School Entry to determine status.)

NOTE: The numbers and letters on these columns coincide with those on the SCHOOL SUMMARY SHEET

NAME OR ID	UNCONDITIONAL ENTRANTS			CONDITIONAL ENTRANTS																				
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	
banks, gary	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
bramlet, casey	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
cason, antoine	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
gordon, cletis	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
gregory, Steve	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
hester, jacob	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
jammer, quentin	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
kaeding, nate	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
naanee, legedu	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
oliver, paul	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
pittman, billy	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
rivers, philip	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
thomas, marcus	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
tomlinson, LaDairian	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Total all pages	0	0	0	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14	14

PRINT OPEN AS PDF OPEN AS EXCEL

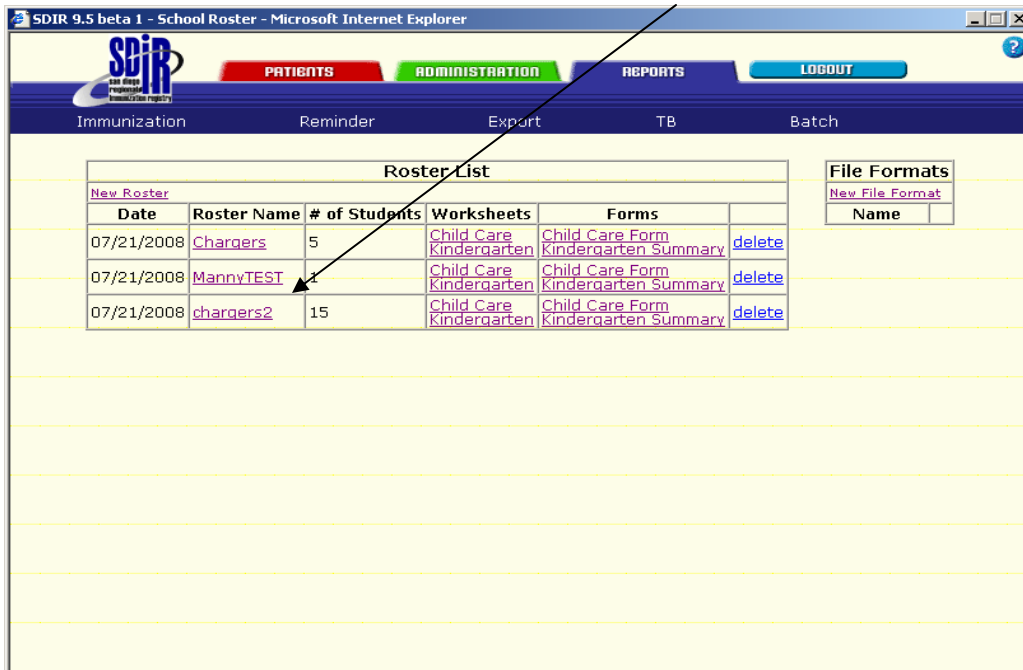
When you select the Child Care Form or Kindergarten Summary under the “Forms” field the appropriate State forms are generated.



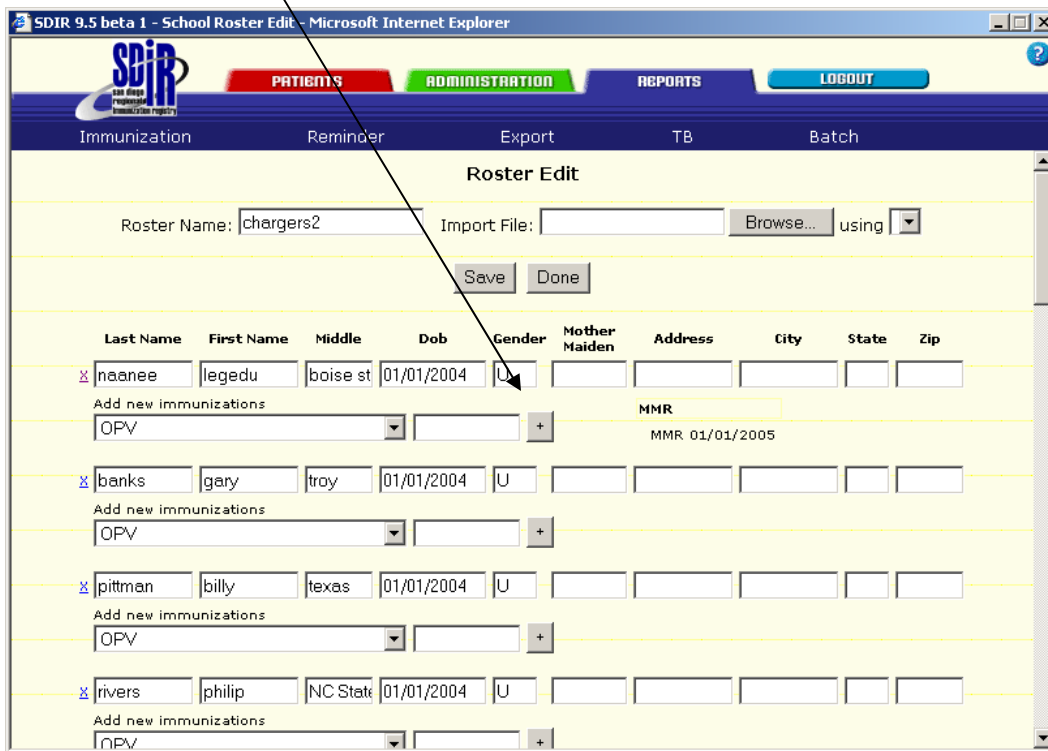
To “Delete” a roster. Simply click the delete option.

**To add or edit a saved roster:**

- 1) Select the Roster Name- for this example, choose chargers2



2) To add new immunizations simply click on the “Add new Immunizations” drop down menu and add the date. Then click on the “+” button.



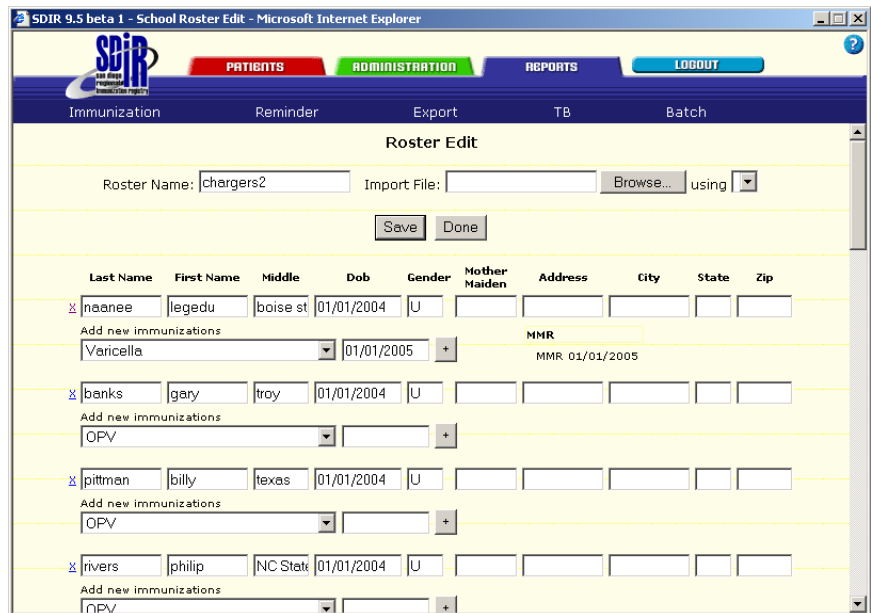
A vaccine dose of varicella has been added to the student record for

Last name: Naanee,

First name: Legedu .

Now that child has an MMR and a varicella recorded in the registry.

Note: To satisfy FERPA, the school must have a written consent to release student information prior to entering any personal or immunization data in the SDIR.

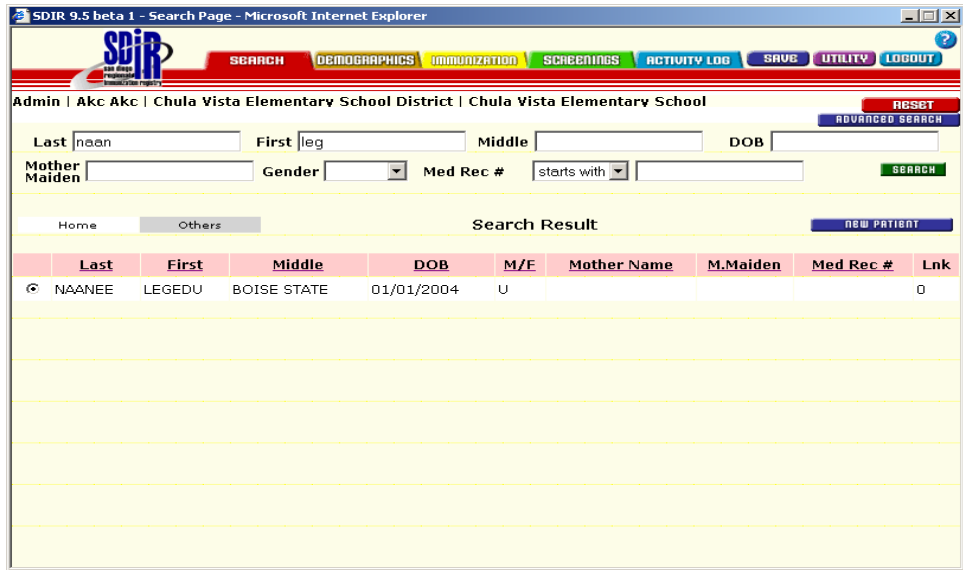


Click on Save. To exit the Roster Edit screen, click on **Done**.

Note: If this individual’s record is new to the registry, you should click on the **Merge** button at the bottom of the page, to put this record into the registry database. The next time you search for the person, the record will be appear listed in the search results.

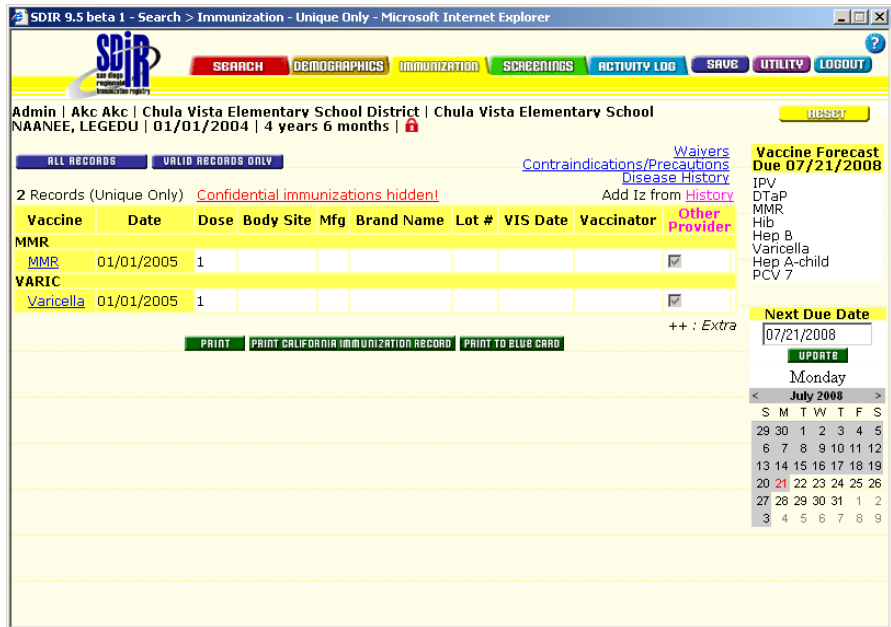
This will input the immunizations you just updated to the record in SDIR.

Search for patient in SDIR and verify that IZ has been updated.



Notice that the varicella vaccine dose added in the student roster also updates the patient record in SDIR.

Also, note that the new record is “locked” to sharing with other providers using the registry until the parent receives the disclosure information.



Here's a sample of a child's record that was entered through the school roster report and now is "Locked" or confidential. See the red Lock on the right of the name.

Click on "Change:" to edit the status.

https://www.sdirtrain.org - SDIR 9.8 - Search > Patient - FOR AUTHORIZED USE ONLY - Microsoft Internet Explorer

Admin | First Last | San Diego Unified School District | San Diego Unified School District

THIRD, STUDENT | 06/12/2005 | 4 years 3 months |

IPID - 592875 Record ID - 8204134 \* Required Fields PATIENT OTHER

Last \* THIRD First \* STUDENT Middle Gender \* Male DOB \* 06/12/2005 Verify \* MatchMerge 2.1

Address Address 2 City State CA Zip Bad Address

Phone 1 Contact 1 Multiple Births Unknown Birth State Ethnicity Unknown Language Other

Mother Last Mother First Mother Middle Mother DOB Mother SSN Maiden Name

WIC ID Facility San Diego Unified School District Reminder Yes Status Active VFC 5-Not Qualified

Date Modified: 09/18/2009 [Confidential: Y as of 01/01/1900] [CHANGE](#) Home Record: [Archive](#) | [Link](#) | [Unlink](#) | [Sibling](#) | [Show Iz](#) | [Print](#)

No Duplicate Records to Display

Click "Yes" to change the patient confidentiality status

Change Patient Confidential Status

Are you sure you want to change the Patient Confidential Status from Y to N?

The 'lock' will be removed and thereby, all authorized users when a successful search is made for this record, will be able to see the demographic information and the immunization record.

https://www.sdirtrain.org - SDIR 9.8 - Search > Patient - FOR AUTHORIZED USE ONLY - Microsoft Internet Explorer

Admin | First Last | San Diego Unified School District | San Diego Unified School District

THIRD, STUDENT | 06/12/2005 | 4 years 3 months

IPID - 592875 Record ID - 8204134 \* Required Fields PATIENT OTHER

Last \* THIRD First \* STUDENT Middle Gender \* Male DOB \* 06/12/2005 Verify \* MatchMerge 2.1

Address Address 2 City State CA Zip Bad Address

Phone 1 Contact 1 Multiple Births Unknown Birth State Ethnicity Unknown Language Other

Mother Last Mother First Mother Middle Mother DOB Mother SSN Maiden Name

WIC ID Facility San Diego Unified School District Reminder Yes Status Active VFC 5-Not Qualified

Date Modified: 09/18/2009 [Confidential: N as of 09/18/2009] [CHANGE](#) Home Record: [Archive](#) | [Link](#) | [Unlink](#) | [Sibling](#) | [Show Iz](#) | [Print](#)

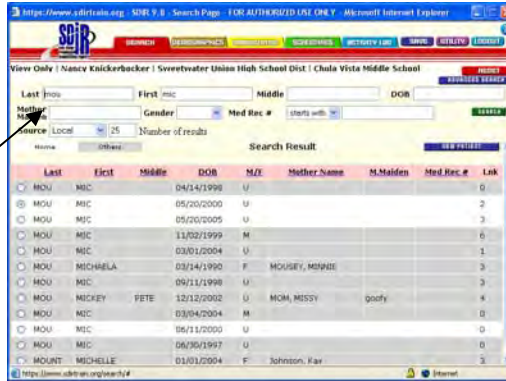
No Duplicate Records to Display

## How to Produce the CHDP Annual School Report

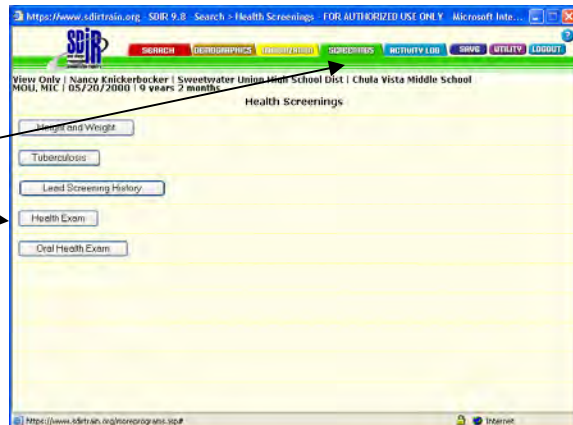
Parents or guardians of children entering school are required by California State law to provide their child’s school with documentation of a health examination (HE). Schools are required to collect forms for each child, and then place the form in the child’s permanent record. Schools track the number of students who received a HE and report these numbers to the County of San Diego CHDP Program and the San Diego County Office of Education, respectively.

**Note: The CHDP Health exam results can be entered in the school roster format in the same way that immunizations are entered into the roster. This section presents the 2nd option for entering results.**

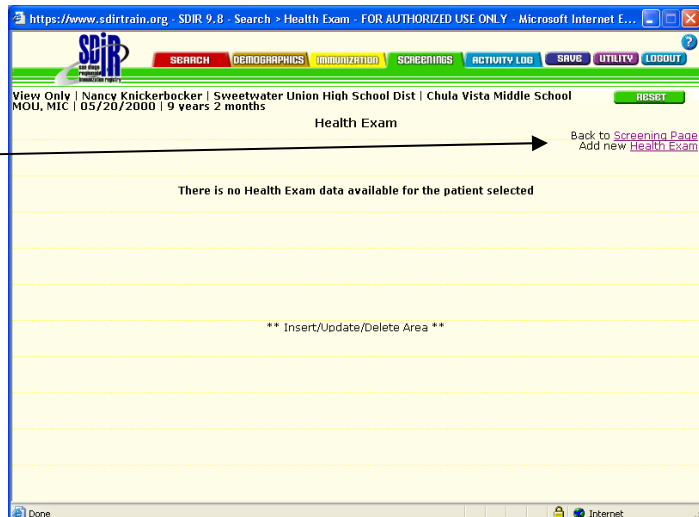
This option for entering the date and results of the CHDP Annual Health Exam is to search for a child’s record. If no record is found, then create a new record. Enter demographic information and save.



Click on the Screenings Tab and then on the Health Exam.



Click on “Add New Health Exam” to enter new information.



Enter the Exam date.

If appropriate, click on the waiver. Enter any additional notes. Click on the insert button.

The screenshot shows the 'Health Exam' form in the SDIR system. At the top, there are navigation tabs: SEARCH, DEMOGRAPHICS, IMMUNIZATION, SCREENINGS, ACTIVITY LOG, SAVE, UTILITY, and LOGOUT. Below the tabs, the user information is displayed: 'View Only | Nancy Knickerbocker | Sweetwater Union High School Dist | Chula Vista Middle School | MOU, MIC | 05/20/2000 | 9 years 2 months'. A 'RESET' button is visible. The main heading is 'Health Exam', with links for 'Back to Screening Page' and 'Add new Health Exam'. A message states: 'There is no Health Exam data available for the patient selected'. Below this, there are 'INSERT' and 'CANCEL' buttons. The form fields include:
 

- Record Date: 07/22/2009
- Exam Date: (empty)
- Waiver:  Does not want  Unable to obtain  No reason provided
- No Documentation of HE
- Notes: (empty text area)

The information will be saved on the main Health Exam page.

The screenshot shows the 'Health Exam' form after the data has been saved. The navigation and user information are the same. The 'Health Exam' heading is present, along with 'Back to Screening Page' and 'Add new Health Exam' links. A table now displays the entered information:
 

Record Date	Exam Date	Waiver
07/22/2009	07/15/2009	No Waiver

 Below the table are 'UPDATE', 'DELETE', and 'CANCEL' buttons. The form fields at the bottom are:
 

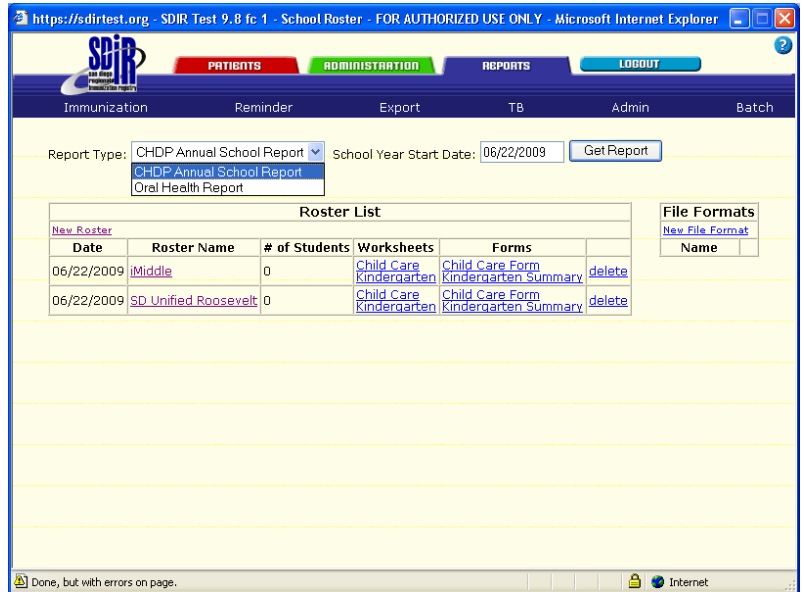
- Record Date: 07/22/2009
- Exam Date: 07/15/2009
- Waiver:  Does not want  Unable to obtain  No reason provided
- No Documentation of HE
- Notes: (empty text area)

Once the health exam results have been entered for a group of children, then go to the Utility Tab and click on the Report Tab.

Select the Report Type: CHDP Annual School Report.

Enter the correct School Year Start Date.

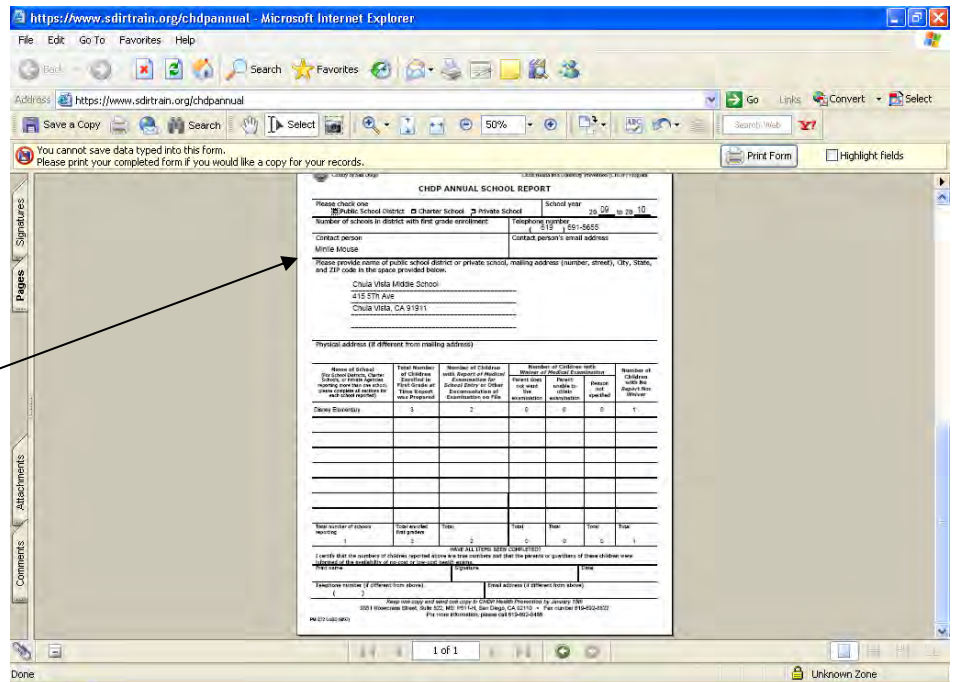
Look at the Roster list to see if the Roster file for that class already exists. If the correct roster is on the list. **Click** once to highlight that specific roster. Then click on the “Get Report” button.



**Be patient! It may take a minute or two for the report to be generated.**

Click in a box that is not pre-filled to type in and complete form.

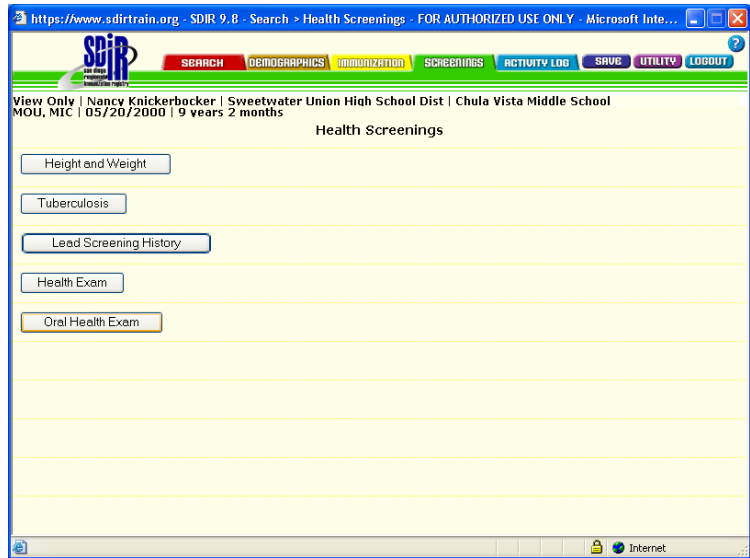
**Remember that the data that was typed-in, cannot be saved on the form, so print out a copy for your records.**



## How to Produce the Oral Health Report

**Note: The Oral Health exam results can be entered in the school roster format in the same manner as immunizations are entered. This section presents the 2nd option for entering results.**

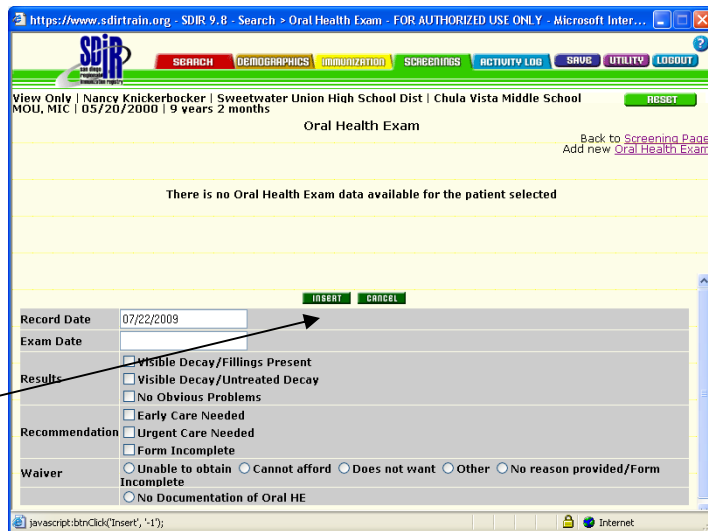
Under Health Screenings, select Oral Health Exam.



Enter the information in the Results and Recommendations.

Note: If entering “No Obvious Problem” in the Results, then enter “Early Care Needed” under Recommendations.

When completed, click on “Insert”.

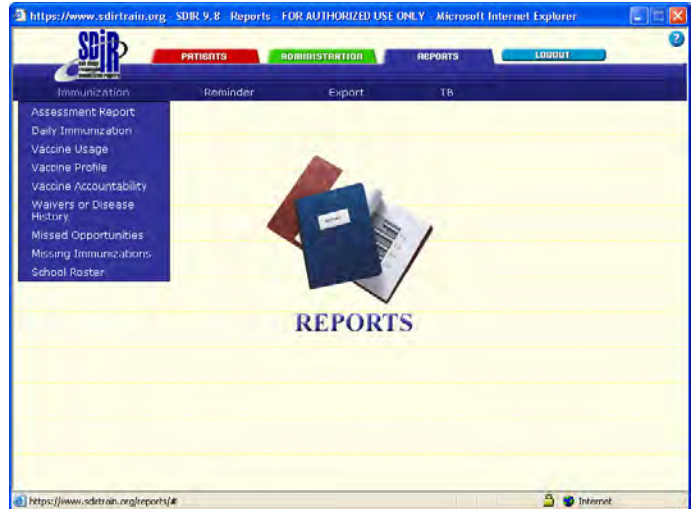


The summary screen will show the entered results. Note that the Results summary also contains the Recommendation.



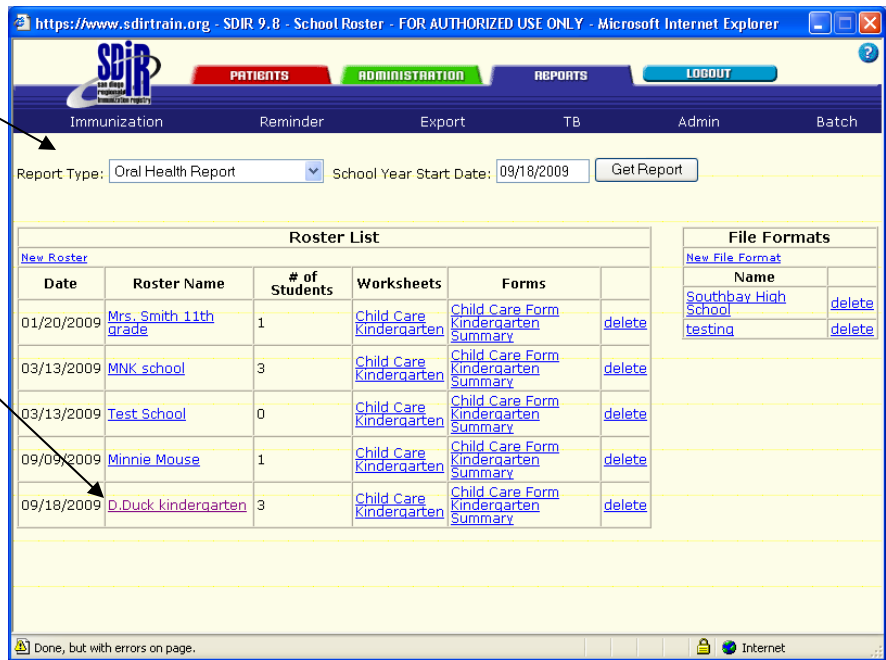
Once all the results of the Oral Health exam are entered, a Oral Health Report can be produced. Go to Utility Tab, and Click on Reports.

Scroll down to the School Roster.



Select the Report Type: Oral Health Report.

Click **once** on the Roster name to highlight the report.



The Oral Health Report will compile data —counts of exams and the results as well as the rates, needed for reporting to the State.

**Oral Health Examination Summary Report**

School District: Sweetwater Union High School Dist  
 Reporting Year: 09-10

School Year	Students with Requirements			Assessment Outcomes							Waivers					
	Total Examinable Students	Total First Quarter Examinable	Total Number of Students with Requirements	Assessments Completed	Care Experiences	Yields Done	No Obvious Problems	Early Care	Urgent Care	Imaging Done	Health Care Referral	Costs Paid	Other	No Forms	Total Waives	No Documentation
09-10	2	0	2	2	1	1	1	1	1	1	0	0	0	0	0	0
<b>Total</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Calculated Compliance Values**

Compliance Rate: 100.00%  
 Waiver Rate: 0.00%

**Assessment Outcome Rates**

Rate of Urgent Care Needed: 33.33%  
 Rate of Early Care Needed: 33.33%  
 Rate of No Obvious: 33.33%  
 Rate of Visible Decay: 33.33%  
 Rate of Cusp Experience: 33.33%

PRINT    OPEN AS PDF    OPEN AS EXCEL    DONE

## School Report Questions and Answers:

### **Q. What happens in the data entry or upload of batch records for schools when two or more records have the same names and birth dates?**

A. As with any new patient records that will be added to the registry, the most important activity is to make sure that a record for this individual does not already exist in the SDIR. So, when the registry matches records with same first name, last name, and DOB, the application would handle the process by linking the records together. Any records that the application cannot match because it does not have enough information will be put into the Manual Verification section of the registry which is only open to Administrative users. Call the SDIR Help Desk at (619) 692-5656 for assistance.

### **Q. Why is a new immunization record in SDIR marked as confidential (not to be shared with other providers on the registry) when they are entered through the school roster report functionality?**

A. When a new record is entered in the registry through the school roster report, the SDIR will automatically mark the record as confidential so safeguard student personal health information. If the user has obtained a signed parental consent, then the user will be able to change the child's confidentiality status in SDIR. The default confidential date is 1/1/1900 so that if the record matches one already in the system which is not marked confidential, the confidentiality status of the existing record in SDIR will not be changed.

### **Q. Why won't my tab delimited file upload into the School Roster Report?**

A. First, make sure that the **tab delimited file that you want to upload into SDIR is closed on your computer screen**. If it is open, it can't be imported. Then, check the order of the tabs in the file and make sure that fields are numbered correctly in the Roster File Configuration.

### **Q. Why won't the child's information appear on either the CHDP or the Oral Health reports?**

A. The Record Date for the Health or Oral Exam must fall between the start and end dates for the roster.

Call the SDIR Help Desk at (619) 692-5656 if you have other questions, need more information or assistance.